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ABSTRACT

A model was developed for evaluating formal and informal learning by older adults in a variety of contexts. The model, which adopts a longitudinal approach, focuses on the outcomes of provision and is based on the assumption that outcomes should be evaluated in light of the processes (accessibility and responsiveness of provision, appropriateness of instruction to participants, user satisfaction, and cost) by which they have been achieved. The model was developed with consideration for the essentially unquantifiable nature of many outcomes involving older adults, particularly in informal contexts; however, it includes provisions for supporting qualitative data by quantitative data. The model was used in case studies of the following program for older adults: Discovering New Horizons Group (a 5-day residential program in the Grampian region of Scotland that offers mainly outdoor activities to individuals aged 50 or older); Video in Pilton 50+ Group (a program teaching older adults to produce videos); and Pensioners Action Group East (a pensioner's group in Glasgow, Scotland that operates an education and information center for older adults). The case studies confirmed the model's validity as a tool for funders, policymakers, providers, and participants to use in evaluating local community-based initiatives. (Contains 11 references.) (MN)

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**EDUCATION AND OLDER ADULTS:
A FRAMEWORK FOR EVALUATION**

CHRISTOPHER PILLEY

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OCTOBER 1994

**EDUCATION AND OLDER ADULTS:
A FRAMEWORK FOR EVALUATION**

CHRISTOPHER PILLEY

FOREWORD

For many of us working in adult education, trying to evaluate a particular piece of work can often feel like wrestling with a rather slippery octopus; so many aspects to embrace with just one pair of hands. But problems due to lack of time and energy are often compounded by lack of clarity in an evaluation exercise – the failure to ask ourselves exactly what we are looking for, why and for whom.

Chris Pilley's paper offers some of this missing clarity in regard to work with older adults in particular. It puts together elements from various models to present a systematic approach – a 'framework' – which can serve as a checklist in an evaluation exercise. It is especially useful in that, in considering outcomes, it points to the importance of what emerges in the long-term as well as in the short-term, and it differentiates between what is expected and what is unexpected.

Within adult education there exists much cynicism about the blunt instruments we are sometimes asked to use in evaluation – instruments which focus on easily measurable outcomes only, and which seem to kill rather than to tame the octopus. Pilley's model does encompass such quantifiable factors, but it also includes many other aspects, including much that is difficult to track and record. One might argue that in practice such suggestions are not practical; Pilley himself admits that it was not possible to fully demonstrate the model's potential within the research project. But he has made a start towards his ideal scenario, and already some of his findings and comments offer important insights. He suggests for example that the point of evaluation is not merely to supply evidence for funders; highlighting what is involved in, and produced by, a course or project should be for the benefit of all concerned (and also perhaps for those who may become concerned at a later date).

It is important to remember that, for participants, a course is a part of their life and, as Pilley's material shows, a course can lead people (especially older adults) to review and re-evaluate their lives. This process cannot be all-embracing but relies on examination of key areas and themes. It tends to involve both pleasure and pain as one considers what went well and what did not. This often leads to some exploration of one's value system itself, and to a significant increase in objectivity and the ability to manage change. Interestingly, this also describes the process involved in a well-balanced and sensitive approach to the evaluation of educational programmes themselves, such as that proposed in this paper. It is an approach which, while not easy to carry out, is well worth the effort.

Anne Marie Bostyn (on behalf of the Editorial Committee)

CHRISTOPHER PILLEY

After an undergraduate degree in Philosophy, and an M Phil on Radio and Adult Education, Christopher Pilley worked for the Scottish Community Education Council for nearly 20 years, and has worked more recently as an independent researcher. His main work has been on informal adult education and older people and includes a study for the Council of Europe, Adult Education, Community Development and Older People: Releasing the Resource (1990).

EDUCATION AND OLDER ADULTS: A FRAMEWORK FOR EVALUATION

SUMMARY

This report develops and describes a model by which to evaluate formal and informal learning by older adults in a variety of contexts. An empirical background against which the framework can be applied and tested is provided by three detailed case studies.

The model focuses on the outcomes of provision, and adopts a longitudinal approach. It suggests that outcomes should be looked at in the light of the processes (the accessibility and responsiveness of the provision, and the appropriateness of the participants, user satisfaction and costs) by which they have been brought about. While it stresses the essentially unquantifiable nature of many outcomes involving older adults, particularly in informal contexts, the qualitative data is supported by quantitative data. The report focuses on application of the model to local community based initiatives and the case studies illustrate the model in action. The model can be applied in both internal and external evaluation.

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CONTENTS

1. Introduction

2. Framework

- i Introduction
- ii Outcomes
- iii Accessibility, Responsiveness and Participation
- iv User Satisfaction
- v Costs

3. Case Studies – Applying the Framework

- i Discovering New Horizons, Grampian Region
- ii Video in Pilton 50+ Group
- iii PAGE Advice Centre, Glasgow

4. Some Reflections on the Framework in Action

1. INTRODUCTION

Many of the criteria applied to the evaluation of post-16 education and training to date have tended to concentrate on economy – how much is being spent – or on efficiency – the relationship between inputs (expressed in terms of resources and staff numbers) and outputs (expressed in terms of student examination performance). This study suggests that there are clear difficulties in applying this type of model to large parts of the education of adults, and that these difficulties are compounded in the case of older adults and non-traditional modes of learning.

These difficulties are particularly pronounced when considering Scottish provision of learning opportunities for older adults, with its greater emphasis on informal approaches, in particular through Community Education Service. In many cases, these approaches are closer to those of youth work than to adult education. Indeed, aspects of community education work with older people have been described as "Youth Work with Older People"!

The model for adequacy and effectiveness in learning by older adults suggested here starts both from a number of distinct characteristics of adults learners which need to be taken into account, and also from a number of additional characteristics which are of particular relevance to older adults.

The characteristics of adult learners include the fact that most adults participate in education on a voluntary basis, and are therefore much more in a direct client/provider relationship in which they are able to vote with their feet. At the same time, there are a whole range of barriers to participation. The motives and objectives of adults' involvement in the learning process are wide ranging, and are often both very complex and intensely personal. Examination success is only one of these, and often not a major one.

Part of the reason for the range in objectives in adults' learning has to do with the fact that adults bring to learning their own much greater volume and range of experience of all kinds than do young people. This range includes educational experience, sometimes distinctly negative, but also a wide range of experience gained outside educational institutions of any kind. This type of experience – experience of life – may, when subject to reflection, be a very significant element in each person's personal history and unique learning career.

All of these characteristics are relevant to adults, of course, but many of them are more important in the case of older adults, and older adults also have particular characteristics and needs of their own.

WHY LEARNING FOR OLDER ADULTS?

The model presented here is based on certain fundamental distinguishing characteristics of older adults, and of their position in the wider social and economic environment. These key characteristics centre around the degree of experience of older adults, and around the nature and variety of that experience.

In taking this approach, this study follows the argument of a recent report on learning in the third age, that the provision of education for older adults is centred around the twin objectives of "personal enrichment" and "individual enablement".¹

1. One aspect of "personal enrichment" is that the range of experience is both a challenge and an opportunity in the facilitation of learning and a key task in encouraging the learning of older adults is to help them to exploit and understand their own experience and that of others, and to relate it to current experiences.² The influence of factors intrinsic to the ageing process on learning potential is much less important than that of social environment and personal history. One key task for providers is to address the challenge of the disjuncture between past experience and understanding about the world and present day experiences, what Jarvis calls the "disjuncture between biography and experience".³

However, a purely developmental approach is not appropriate, as there are differences between cohorts. A number of features of common experience distinguish today's 70 year olds, for example, from those of 20 years ago, or from today's 50 years olds who will reach 70 two decades from now. Of particular relevance to the theme of "personal enrichment" is the fact that, for people aged between 60 and 75 today, childhood and adolescence were disrupted by World War 2. The perception of being a "recycled teenager" is a reflection of the feeling that for many of today's older people they missed out on being a teenager, in the sense they have seen their children and grandchildren be.

2. The experience and contribution of older adults also represents a prime under used educational and social resource, especially in informal educational contexts. Encouraging learning by older adults recognises the "positive potential" of older people and the need for "positive policies" to release this resource.

Together, these two notions reinforce the wider concept of "productive ageing", including both formal and informal productivity in both the formal and informal economy. It recognises the role of older people as producers, as well as consumers, contributing to the 'social economy of the third age'.⁴

This contribution includes both paid work, whether on a part time or full time basis, and

unpaid work. The latter includes a wide range of roles; older adults in voluntary work, in civic and public life, as unpaid carers (a contribution estimated at £15-20 billion annually), as the holders of cultural capital including family roles, and as what Laslett calls "cultural trustees"⁵. But in this context it also includes something less tangible, which would not normally count as work, but is no less important for that. It includes the contribution that older adults can make to the development of the "learning community", as role models to others, as "eggheads", and as standard bearers of the new philosophy of ageing, embodied in the concept of the third age. An important test of the worth of initiatives to encourage learning for older adults is thus whether they "contribute to the full social, economic, cultural and political development of the community and neighbourhood within which they take place".⁶

These trends coincide with a greater policy interest in encouraging active ageing. Wider social issues are involved. For example health: health and productivity depend on each other, and if older people do not take care of their health, then productivity suffers; likewise lack of a productive role affects health. Increasing longevity, and the rising costs of pensions and health care are leading to policy interest in prolonging working life and a greater involvement and social recognition of older people in both paid employment and unpaid work within the family and community. Any model of the cost effectiveness of provision for older people must thus include the actual, and the potential, contribution of older people in these areas.

DEVELOPING A MODEL

In looking at the adequacy and effectiveness of provision of learning opportunities for older adults, it is important to distinguish between two complementary, but different, measures, which apply different types of criteria and have application in rather different contexts:-

1. Operational efficiency.

Outputs measured by quantitative, hard data eg number of qualifications gained, numbers involved in different forms of progression to higher level or laterally, outwards to community (into work, between institutions, personal/social).

2. Effectiveness.

Outcomes measured by qualitative, soft data.

The first will focus on what a learner has learned from the advertised subject matter of a course, while the second will include not only what people can do as a result of the whole learning activity, but also on the whole range of other, often quite diffuse and unquantifiable impacts that it has made both on the learner, and on the wider community. In this sense, as UDACE has pointed out, measures of effectiveness augment efficiency.

The notion of value added, the progress each student makes from his or her own individual starting point, and the notion of outcomes are fundamental to the framework proposed here. Particularly where older adults are concerned, appropriate measures of outcomes can often be quite intangible:

"The key to measuring value added lies in identifying, negotiating and recording individual student, and teacher, expectations, and establishing assessment systems which reflect these. Adult learners' expectations or objectives are often broader than the declared intentions of the course or activity on which they have enrolled: the large numbers of adults who use vocational courses for personal reasons is a case in point."⁷

The same document argues that "this can only happen where learning outcomes have been made sufficiently explicit for learners to identify them as objectives and know when they have been achieved". While it recognises that there are "clear difficulties in developing systems which are able to identify students' expectations, and these are compounded by the fact that many adults clarify their own objectives only during the course of a programme", it argues that "this makes it important to ensure that objectives and achievements are continually reviewed and recorded." In other words, sample expectations at beginning and during provision, and follow with a summative analysis at the end.⁸

INTENDED AND UNINTENDED OUTCOMES

The current study takes the view that this approach is an unduly mechanistic one. As has already been noted, adults often do not have clear expectations, or these expectations may not really be educational ones. Furthermore, many outcomes are unintended and quite unexpected ones, which are only discovered after, often some time after, the original provision has ended.

A rather different emphasis is given by the recent Carnegie Study on education in the Third Age. This argues that "evidence on outcomes is not yet gathered sufficiently systematically (by third agers as well as others)" and suggests that it should inform policy-making and be used to improve practice.

"It would mark a great step towards good practice if all those providing education/training for Third Agers should seek to evaluate its effectiveness, drawing on an array of indicators (eg enrolment, productivity figures, qualifications gained, forms of progression) and range of methods (observation, discussion, evaluation forms), especially those which involve the students themselves".⁹

This is certainly a step in the right direction. The present study seeks to put outcomes, both for individual and for the wider community, at centre stage. The difficulty of

specifying many of these outcomes in advance is merely a reflection of the fact that older adult learners bring their own distinctive histories to the learning experience, thereby rendering the outcomes of each learning experience distinctively personal. (Fig 1)



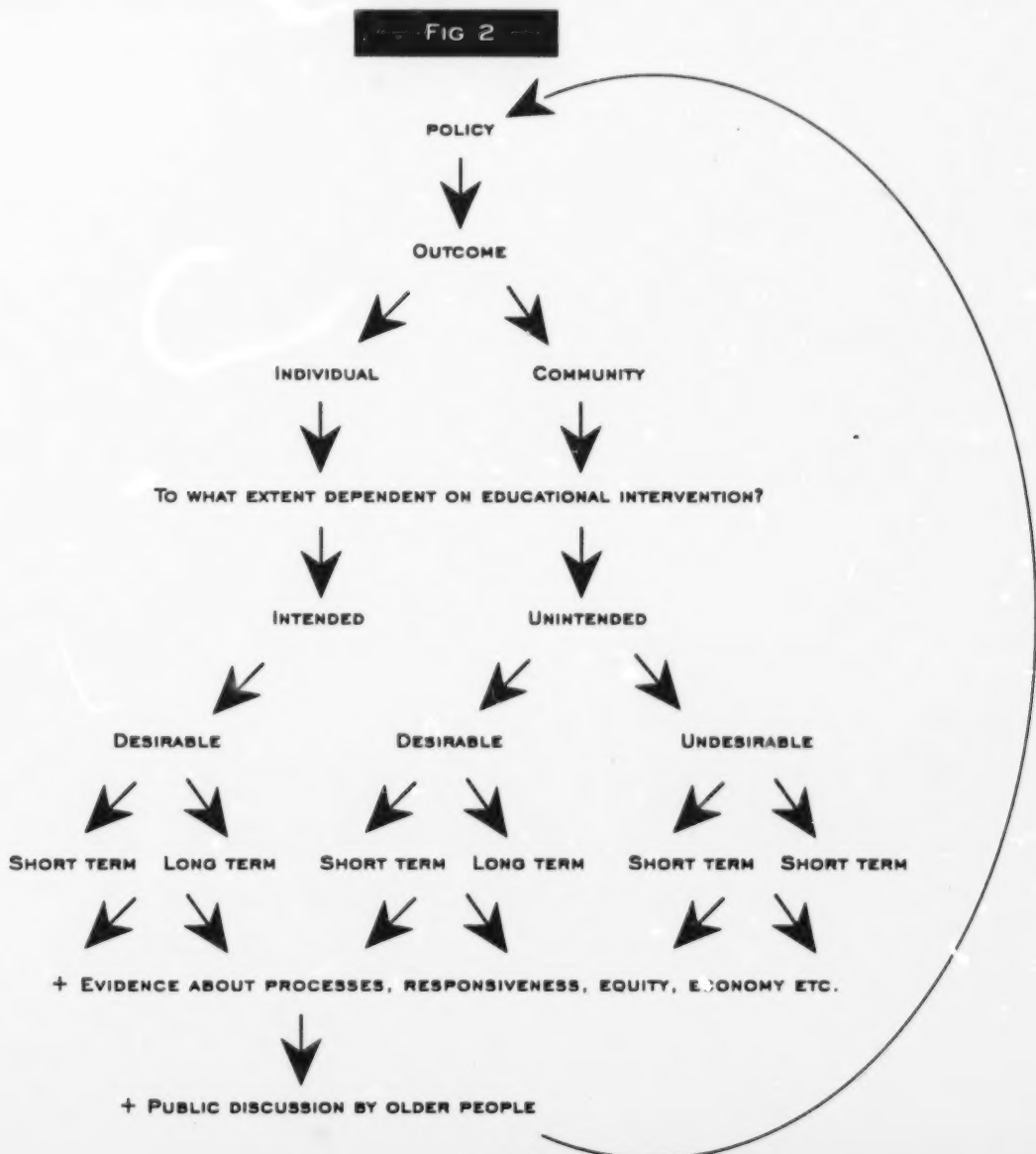
The interplay between the current educational experience and the totality of the adult student's previous (often informal) learning thus generates outcomes which were unforeseen or accidental at the outset. The model on which this study is based focuses on these outcomes, on the factors and processes involved in reaching them and their relationship to the development of policy.

OUTCOME AND POLICY

In the current model, outcomes are closely connected with policy. A policy offers us an answer to the question "Why are we doing this?" and is a recommended course of action for achieving some action or meeting some need. With the focus on outcomes and the benefits of these outcomes, public appreciation becomes easier to enlist as these benefits are promoted and appreciated. Information about what older people are doing, how they are getting involved in their communities, is thus as important as information for older people. There is, in fact, a circular process at work here. As Harrison puts it:-

"where policy-making is dynamic and is interpreted as a circular process involving consultation, negotiation, formulation and evaluation, it becomes a powerful mechanism for involving the participation of individuals at all levels including older people themselves, the users of the education services which are shaped by policy. As such policy making becomes inseparable from policy implementation and the whole process begins to describe something which is in itself educational."¹⁰

Outcomes, taken together with evidence about the processes by which they are arrived at, and taken together with public discussion, feed back into the policy making process and in turn influence policy and outcomes. (Fig 2) But the description and recognition of outcomes is central to this process.



2. A FRAMEWORK

1 INTRODUCTION

The framework which follows is based loosely on the "Performance Wheel" presented in **Measuring Performance in the Education of Adults**, published by UDACE.¹¹ Like the "wheel" it starts from a recognition and description of outcomes of different sorts, and suggests that these should be looked at in the light of the processes (the accessibility and responsiveness of the provision, and the appropriateness of the participants, user satisfaction and costs) by which they have been brought about. It differs, however, in a number of important respects, notably in its preference for a particular "orienting vision" and in its emphasis on the essentially unquantifiable nature of many outcomes involving older adults, particularly in informal contexts.

It also goes some way beyond the "wheel" by setting out a more detailed framework for adequacy and effectiveness by which provision can be judged and it offers both evaluation criteria and measures what can be used as evidence. It also allows for contextually grounded judgements based on evidence gathered from a variety of sources, as well as from the raw quantitative data available. These judgements should be secure (based on good evidence, qualitative and quantitative), first hand (based on direct observation), reliable, (apply criteria consistently) and be valid (reflecting standards actually achieved).

The model outlined here can be applied in both internal and external evaluation. It provides a tool not only to justify to others what is being done, but also to achieve greater effectiveness. We need such a tool to build on success and learn from failure. But perhaps most importantly, it is a tool to document achievement, to let policy makers, providers, and participants alike know when and why they are "winning".

II OUTCOMES

EVALUATION CRITERIA

OUTCOMES FOR INDIVIDUALS

- The difference provision makes to any particular individual.
- Success in terms of examination results, progression, direct and indirect outcomes/ progress over time. Particular skills developed.

Personal enrichment – how provision contributes to:-

- Mental health
- Physical health
- General wellbeing

Individual enablement – how older adults:-

- Acquire know-how, confidence and self-esteem to discover choices and opportunities
- Make best use of those opportunities

OUTCOMES FOR WIDER COMMUNITY

Contribution of older people to:-

- "Social economy of third age": productive ageing, paid and unpaid work
- Cultural, and political development of the community
- Social and personal learning networks in the community
- Family roles – as parents, grandparents and as carers

The extent to which these outcomes are intended or unintended, and are desirable:-

- Short term and long term outcomes.
- Impact on policy

EVIDENCE

- Statistics of qualifications gained
- Numbers moving from one form of provision to another
- Observation of provision
- Discussion with tutors/leaders and learners
- Examples of learners' work (where appropriate)

III ACCESSIBILITY, RESPONSIVENESS AND PARTICIPATION

EVALUATION CRITERIA

GENERAL

- Numbers participating in provision
- Social distribution of different groups participating (equity monitoring)
- Steps taken to increase participation by under-represented groups
- Responsiveness of monitoring and evaluation procedures

ASPECTS OF ACCESSIBILITY AND RESPONSIVENESS

- Physical: accessibility of learning environment
- Curricular: range of opportunities provided: responsiveness of provision to needs/ opportunities; encouragement of public discussion, particularly by older people themselves, of desirable outcomes and policies to support them; opportunities for progression, partnerships with other providers; separate provision for third agers, if appropriate
- Psychological: Provision of appropriate physical, emotional and social environment
- Financial: Measures to make learning environments financially accessible
- Timing: Learning opportunities at times convenient to older adults
- Guidance and information: Content and accessibility of information for older people

EVIDENCE

- Publicity material and the range of ways in which it is made available
- Demographic data

- Observation of participants
- Discussion with staff and participants

IV USER SATISFACTION

EVALUATION CRITERIA

WHAT DO THE CLIENTS THINK OF WHAT THE PROVISION IS LIKE TO USE?

- How do they feel about the processes involved in the provision?
- What were their expectations, motivations, intentions, actions, feelings, understanding, problems and difficulties encountered?
- What do they think about the staff?

EVIDENCE

- Questionnaires
- Personal interviews
- Focus Groups

V COSTS

EVALUATION CRITERIA

- Judgements about value of outcomes, foreseen and unforeseen, desirable and undesirable, (see Introduction, Figure 1) and of appropriateness of processes to bring them about.
- Costs of achieving these outcomes.
- Costs of failing to adopt policies to encourage desirable outcomes!

EVIDENCE

- Budgetary statistics
- Outcomes highlighted
- Processes to bring outcomes about

3. CASE STUDIES - APPLYING THE FRAMEWORK

1 DISCOVERING NEW HORIZONS - GRAMPIAN REGION

The first Discovering New Horizons Group took place in 1986. The courses offer a range of (mainly outdoor) activities, selected by the participants, to around 15-17 over 50s in a 5 day residential setting. The activities include swimming, canoeing, sailing, mountain biking, pony trekking, hill walking and orienteering, as well as painting, archery, pottery, bird watching and other forms of nature study. Great store is put on group activities, and on discussion of what has happened during the course and of what is planned. Costs to participants are deliberately kept low to be within the reach of someone living on the basic pension, and additional financial help is available. Twice as many people apply for the two courses each year as there are places available.

Providers and participants agree that the course has stimulated a great deal in the community. One of the participants in New Horizons responsible for this is "Mrs A". When "Mrs A" retired, she spent some time getting her affairs in order and, in her own words "did my embroidery that had been lying around for years, and cleaned up the cupboards and then thought "there must be more to life than this!". She started looking around for things to do. She was too late that year, but was accepted the following year. As a result of her participation, a whole range of activities have sprung up at Westhill; as she says "I felt that if we could do these things at New Horizons, we could do them here!"

Following the course, John Troup, one of the Community Education leaders on New Horizons, issued her with a challenge, "Now, what are you going to do now?" As a result a Community Education 50+ Group was set up, first offering a walking group, then swimming and discussion, sequence dancing, keep fit, art, creative writing, a readers group, and a German class in preparation for a visit to Austria. They also run their own residential, with the help of the outdoor tutor, and went to Orkney this year. She feels that these are especially important for people on their own. Each group has its own representative, who meet every few weeks to report on problems, and feed in to the Centre management committee.

Mrs. A, who now has a part time job supporting the groups, recognises that the 50+ Group is a valuable way of channelling energy and enthusiasm from New Horizons, and that it now has a real impact in the community as more people come in.

Mrs B. retired in 1982 and lost her husband shortly afterwards. Living at Culter, she joined a WEA discussion group. Out of this came the idea of an over 50s walking group proposed as part of a pilot programme of three groups by John Troup (an idea then received with some scepticism by colleagues). From three groups in 1985, there are now 34 groups involving a total of some 700-800 people. The groups now run their own residential, where they do their own catering.

Through the walking group she got involved in New Horizons in 1986 when 16 participants went to Grantown on Spey and stayed in a guest house.

"It was fantastic to be able to choose what to do. We could do things that my parents didn't have money to let us do when we were young. People who were terrified at the idea of water sports, were trying it the next day. I went canoeing, sailing, skiing, and even if you felt you couldn't do it, you did it anyway! One of the great things was going back to childhood, you could make a fool of yourself, and everybody enjoys games of childhood."

The spin-offs have included a visit to Austria in 1989, involvement in outdoor groups, talking to pre-retirement groups, hospital visiting, and participation in an over 50s drama group, which is now running itself. The group, "StAGeRs" put on a show at *Rarin' to Go!* in Glasgow in 1990 and took it to Dublin, 1991's City of Culture, where they met the President of Ireland. "If someone had said to me that, when I retired, I would finish up maybe in Dublin meeting the president, I'd be like other people and say that could never happen to me!" While Mrs B. admits that she had done some drama at school, her efforts at Glasgow were after a gap of some 50 years! The drama group have now applied for grants to put on a play on the theme "The Land and the 4 Seasons" to be shown at primary schools and retirement homes, using material written at a creative writers course.

This theme of people doing things for the first time, or having the challenge of pushing oneself to do them for the first time since young is an important one. Having felt an old lady 10 years ago, Mrs B was the first "recycled teenager!", a term which is now the title of a widely shown video made by the "Video in Pilton 50+ Group". After Grantown she was given a card with this title, which she made into a badge. Reflecting on the significance of this, she adds "it seemed right, everything's recycled nowadays and I felt like a teenager". Her teenage days had been spent during the war, then she had got married and brought up a family. She now feels a new freedom and often wonders if she would be doing this if her husband were still alive, "because I don't think he would have become involved".

STONEHAVEN

Another group, all from Stonehaven, did a New Horizons Course in 1990 including canoeing, sailing, using a compass, climbing Cairngorm, using a chairlift, studying ant-hills, orienteering and playing various trust games. The discussions and exercises, for example answering the question "who would you be if you weren't yourself?" A teddy

bear?, a tree? were also important in helping people unbend, though they also had their serious side. As one participant said, "everyone was as daft as everybody else".

At the end of the week, members felt tired but also surprised at what they had achieved. As one participant puts it, "What didn't happen at Grantown!" It is significant that their expectations had been very vague at the beginning of the course, and few expected what they got. Many participants just found themselves doing things, often egged on by others.

Another important element was the fact that they were trying things out in a group of around the same age – they were all senior citizens, with common elements of experience and knew the same stories and songs, for example. Many felt that it was "like the old days; we made our own fun when we were young. It was a happy party."

Many also felt that they had been denied the opportunity to let their hair down in this way when they were young. One participant points out that she was "16 when the war broke out" but had seen her sisters seven years older going out to dances before the war. And the war was followed by marriage." We should have been doing the things we were doing on New Horizons when we were in our teens."

The group from Stonehaven decided that they had got so much out of the course that they would stay together after it and keep together for weekends. Several of them have got involved in a very active Elderly Forum in Stonehaven and have brought new people into Forum, giving it a new vitality. They have also raised money for a new resource centre and for a mini-bus. More generally, they have become active in the local community, where planned housing developments are one important issue. They have also become heavily involved in the growing network of walking groups, culminating in an annual ramblers rendezvous, attended by more than 200 people in 1992. One former New Horizons participant was responsible for organising the barbecue with 420 hamburgers.

This group are in no doubt about the importance of New Horizons stimulating this and other forms of involvement. They also agree that the challenge of doing things they hadn't done before was more important, long term, than the actual subject matter learnt about.

SOME COMMENTS

"I felt exhilarated and proud of a part of me I didn't know existed."

"Much better than any medicine."

"Five years ago I considered my life drawing to a close but now I feel differently – I just look forward."

"Upon reflection, what we achieved amazed us both, and has given us the confidence to seek ways of escaping the trap of idleness which is normal for people of advancing years."

"It is truly amazing how, in the course of only 5 days, 17 different people gelled, became very supportive of each other and I am quite sure forged permanent links of friendship. In a wider sense, this spirit of camaraderie, of helpfulness and of overcoming one's phobias can only be for the good of the community at large. The sense of achievement will prove to be of tremendous value in one's future activities. For some the course will prove to be the catalyst needed to go out and encourage others to participate in life to the full, thereby promoting a confidence which often diminishes as people grow older. Government money should not only be targeted to help older people with their infirmities, but equally importantly be allocated to giving this same age group the opportunity to experience many activities denied them in the past. These people are not just "finished" but, with more available time, have a great deal to contribute to society..."

"Every aspect of the week is a confusion in my mind with the overall feelings of accomplishment, encouragement, fun and laughter ... I shall put this week away in my memory and, when snow blankets my fields, live in the stored delight of it, like a squirrel on nuts. And with the confidence instilled by the three of you, (the leaders) I will continue into even more adventures ... to build up my winter store."

THE STORY OF ONE NEW HORIZON'S PARTICIPANT

1986 — quiet, reserved and lonely, visited "signpost Exhibition" expressed interest in the out of doors, Community Education Service representative made personal contact and noted her name and address.

1987 — sent details of DNH, attended DNH, joined walking group at local community education centre, also residential and DNH reunion — made new friends, happier.

1988 — attended safety training course on out of doors, joined gentle exercise class, helped to plan residentials at Braemar, sailed at Loch of Skene.

1989 — walking groups, gentle exercise class, helped plan and took

part in residentials, Fun week, took part in making video on Medicines and Older People, saw finished video.

1990 – nostalgia workshop (tasters in art, music, drama, movement and creative writing). Took part in pageant "700 Years of Castlegate", on stage for the first time. Attended course at field centre, new activities included mountain biking and trust games. Planned and took part in drama presentation to take to "Rarin' to Go", older people's arts festival Glasgow, subsequently on tour.

1991-2 – ill health and family bereavement, because of commitment and purpose in life, fought to return to good health and regular commitments eg helped plan arts workshop day, steering group member of StAGers and working on new production.

CONCLUSIONS

The Discovering New Horizons courses illustrate the potency of the model in action. They highlight, in particular, the value of a longitudinal approach to outcomes, as well as the range of unintended outcomes, not only for the individual, but to the life of the community in which they live.

New Horizons participants themselves, perhaps not surprisingly, have also been important in highlighting some of these outcomes both to the wider public and to policy makers. Many have contacted their local councillor to point out the benefits they have had from the week, and the fact that they have done so is, of course, in itself an outcome, and a reflection of their own growth in confidence following the course. The success of New Horizons was an important element in gaining greater acceptance for education work with older adults at a policy level in Grampian Region, and the decision by the Regional Council to make a full time appointment of a Development Officer responsible for work with older adults in 1989.

The courses are highly responsive, in terms of subject matter, and accessibility is facilitated both by the fact that they are promoted locally largely by word of mouth. A certain mystique has grown up about them, as people have seen exactly how much of a difference they have made to participants. They are also highly subsidised, which is an additional factor in making them accessible.

Another key factor in accessibility is a psychological one, through which previous participants become "role models" in their own communities. While oversubscribed, those who do participate become local role models for a wide range of other activities in the community.

There was considerable unprompted evidence from participants in New Horizons that

they felt that the courses represented a qualitatively different type of provision for older adults from that in parts of England and offered outcomes with far more potential to the community as a whole. The cost to the local authority of the courses is difficult to quantify. For the September 1992 course, income from participants (£1360) largely covered the costs of half board at the hotel, and this was augmented by a grant of £225 from the Region to cover extra staff costs and a grant of £225 from a small grants fund. Additional costs, from public funds, thus came to less than £500 or £30 for each person. The benefits, while largely unforeseen by the participants, go far beyond those participants to touch, in many cases deeply, the community as a whole.

II VIDEO IN PILTON 50+ GROUP

"What can I do? Sit and watch TV
Make a cup of tea, or go for a walk
and hope to meet
someone,
then return to my lonely flat.
There must be someone somewhere
that I can share my hopes and dreams
and not be
alone
the rest of my days.

"I used to feel like that", says Gordon Marshall, "and I thought that was it for the rest of my life. Then I was encouraged to go along to the Craigroyston 50+ Group and I began to get more involved. It was awful at first", he says, speaking of his shyness, "and then I realised there were lots of other activities over 50s could get involved in."

Eventually this led to him being a leading member of the 50+ Video Group.

George White, another of the early participants, met Gordon through an Action for Health group at Craigroyston School.

"He was always talking about the video group – so I went along to see what he was on about. Up to then I'd thought that video was sitting watching television – I didn't realise we'd end up making our own programmes! It was great. The main aim of the group was to show people who are lonely or shy that there's no need nowadays, there are plenty of activities around. We started off by doing research, going to meet community workers and 50+ Groups – finding out what they

were doing and seeing if there were any activities that would look interesting on video."

The programme took six months to complete. Under the direction of Joel Venet, Video in Pilton Project leader, the group learnt to use the equipment, how to make the programmes, how to prepare for interviews, how to explain clearly to people what they were doing as well as how to apply for funding.

The video which was given the title "The Recycled Teenager", has since been shown by Gordon widely among 50+ and other groups in Edinburgh and the rest of Scotland, as well as Australia and America. Apart from being a valuable learning experience for those who made it, the video raised important issues about the role of older people in society and has also proved particularly valuable in encouraging older people to take up the activities shown in the video rather than "sit in the house all day", as Gordon had done earlier. Typically Gordon introduces the video and answers questions on the activities shown, with a view to encouraging people to try them. Even in Pilton, where it was made, Irene Garden, secretary of Pilton Elderly Forum, confirms its effectiveness: "many of our members, having seen "The Recycled Teenager", have decided to take up new activities like swimming or drama, for the first time."

At the same time, the project has highlighted the potential of video with older people in other ways. In 1990, members of the group, including Gordon, were invited to show "The Recycled Teenager" and, for the first time to run Video Workshops at a major European Older People's Arts Festival in Maçon in France.

"That's what interested us about the Pilton project" said one of the Festival organisers, François Rysto, "older people can be educating other classes of the population, educating older people to become educators, I think that that is the future of the European culture of Older People. This way the Pilton Video Project worked with the 50+ group was exactly what we were looking to achieve in France." Since the visit to Maçon, there have been further spin offs, and the point that François Rysto was making has been further highlighted. Video in Pilton Project's own production company made a film about the background to "The Recycled Teenager" and the visit of the 50+ Group to Maçon, which was shown throughout the UK on Channel 4.

There are now effectively two strands to the group's work. One group, which Joel Venet calls the "Scottish Documentarists", are specialising in documentary programmes and have made a documentary on disability and housing, which was shown on Scottish Television as part of their "First Reels" series for new film and video makers. Funding from Lothian Region's small grants budget allowed for funding for a tutor to help them.

The idea was Gordon's. In the process of making the video, he feels that he has learnt a lot more about disability. For him and others involved, researching the video gave rise to a feeling of moral indignation amongst those who made it, and this contributes to much

of its impact. He quotes the example of one man, confined to a wheelchair, who was a prisoner in his ground floor flat, because of the five steps up to his front door.

The video has had a wider impact on the community. It has provided a vivid picture of the problems of disabled people in the local community and all the members of the group believe that, provided it looks professional, it is a very effective advocacy tool. Showing wheelchair users mixing it with the traffic in city streets, because the pavements are too high, has had far more effective impact on the authorities than writing letters would have had. In turn, local people's perceptions of themselves change from being victims to being agents for change, as they realise that they can transform the environment around them. Attitudes to disability within the community have themselves been changed as a result of viewing the video. As Gordon himself says, "disability is not a disease!".

Gordon and other members of the group have since also acted as consultants, running a series of video workshops in the community in different parts of Scotland, which are well publicised locally, training people in the use of video. Participants come in two broad groups – some hadn't seen themselves as having anything to do with video, because having contact with video was outside their immediate experience, while others, who owned or had access to equipment, but didn't know how to use it, felt the need to know more. In this sense the workshops crossed income and social divides.

Another group – the "Hollywood wing" – are currently working on their first fictional video, "Carousel", in which a retired man looks back on his life from childhood in the early 30s. It is a story of one man who grew up in a mining village before the war, fought for his country, and then spends his working life in a bottling plant. It concentrates on the challenges of retirement on the basic pension facing this "survivor", and the adjustments he has to make. The team making the video is headed by Henry, himself a war veteran in his late sixties, who now lives in a Veterans' Home in Edinburgh.

In making the video they have had to learn a whole new set of skills, with help from Joel Venet, and a young film maker attached to the project. The story board was written as a cooperative effort between the members of the group; they had to learn how to edit and construct a story, plan shots and direct and edit a production. They were also managing actors for the first time and had to negotiate fees. They had to think back to how things were in the 1930s, costumes had to be found, and the actors, in some cases children from the local primary school, had to be introduced to what life was like for them at that age. They had to find suitable sets. These aspects often needed a great deal of tact and sensitivity to carry out.

CONCLUSION

This case study also highlights the value of adopting a longitudinal approach. The outcomes that can be identified are many and varied, and many will not have been anticipated. They

cover both personal enrichment and individual enablement and the case of Gordon himself illustrates both of these. He, and the other members of the group, have learnt a great deal about the process of making a video. The process includes how to use the equipment (Gordon himself started as a sound man) also research, planning and developing a script, both documentary and fiction, production and post production skills, editing, marketing, and distribution – presenting the video to community groups. He has also overcome his shyness and his depression after the death of his father. As a result of the project he has also been enabled to discover options and act on them. He has developed ideas of his own and seen them come to fruition. He has also gained the confidence to speak up, and a sense of purpose. With characteristic understatement he says "It has altered my life quite a lot really. I think I have achieved something. At my age – I'm 61 – I think I've achieved more in the past 2/3 years than I ever expected to." His is not the only story.

The outcomes also spin out in many other significant ways into the life of both the local and wider community. The cultural contribution of the group, through the video skills they have developed, while important, is only a start. While the contribution in terms of the social economy of the third age is difficult to quantify, their contribution as standard bearers for a new philosophy of ageing, embodied in the concept of the third age, whether in showings of the video, workshops, or in the productive roles depicted in a video like "Recycled Teenager", is highly significant.

One important aspect of the activities of the 50+ Group has been that local people now see them as role models who, by their activities, have enhanced the quality of life of the community as a whole. Those local people who appear in productive roles in the videos are also likely to be seen differently by all members of the community. This has several dimensions, for the perception of these roles can differ depending on who is watching. For one person they may be "granddad", for another, "the man next door who is retired like me". Media images are a powerful weapon in promoting such productive roles. As Joel Venet says, after "From Muirhouse to Maçon" was shown on television, people came up to them on the street. Local people identified with programme, because it was about them, and about people they knew.

The 50+ video group to all intents and purposes sets its own agenda. The provision offered is in this sense highly responsive (indeed identical) to the wishes of its members and the only constraint is the ability to obtain funding for a specific project. Though the numbers participating in the group are small (the core group numbers no more than five), the provision is accessible and responsive to a far larger group than that, and far larger numbers are participating in the process that the group's activities set in train. Gordon's workshops, for example, are accessible and responsive, and they have involved considerable numbers of people. The showings of the videos (including the various messages, both about the team that made them and the processes involved, as well as the messages of the videos themselves) have also been accessible and involved much larger numbers. And each

of these outcomes will, of course, have generated their own outcomes in turn. One of these outcomes is likely to be ideas for new issues to explore in future video projects!

Like *Discovering New Horizons*, the project has had beneficial outcomes that go far beyond the immediate participants, but could hardly have been foreseen by them. What, for example are we to say about the man who takes up sailing as a result of attending a screening of "Recycled Teenager". What results might come from that? What value are we to put on the transformation of a disabled person's life as a result of advocacy through video? What value is to be put on the transformation of Gordon Marshall's life? What value can we put on the lives of those older people (and the contribution to community they are able to make as a result) which have been changed by adopting a changed role model of an older person as a result of the group's activities?

The 50+ Group raises particularly complex issues in relation to cost. For a start, it is now an independent charity simply associated with Video in Pilton, which is funded by the Urban Programme. Joel Venet suggests that there is a tension in this area of work between the costs of equipment, and the costs of expertise. Many community centres have bought equipment, but don't have the required expertise, while he firmly believes that the success of the project has been based more on the learning of skills than on the hardware, and on the availability of video workers to help the group. Though some of these have been paid, students and volunteers have also been used. The group themselves, of course, have all worked on a voluntary basis, to contribute to many of the outcomes described above. The group have also had access to the wide range of VIP's equipment, and this has been more than strictly necessary.

Joel's own estimate is that "Recycled Teenager" cost nearly £10,000 to make. To some it might seem an expensive way to get a point across. But this begs the question of what the totality of the outcomes of the process of making the video, and the results of showing it, were. Only some of these have been outlined here, and new ones continue to result, and will continue to do so for many years.

III PENSIONERS ACTION GROUP EAST, GLASGOW, ADVICE PROJECT

Pensioners Action Group East (PAGE) covers one area in the East End of Glasgow which shares the deprivation of many inner city areas. One aspect of this is the large number of older people - of a population of just over 50,000, over 60s make up nearly a quarter. Most pensioners are poor, living on the old age pension, and many are entitled to other means tested benefits, though not all claim them. There are also a large number of pensioners' groups in the area, including social clubs, lunch clubs and clubs for disabled people.

Over the past few years the local social work department has been developing a community development approach in the area, working with local community groups to increase participation by older people in the community activities and to help older people to come together themselves in "interest" groups campaigning on specific issues of concern to them. In 1983 Val Dick, at that time Community Development Worker in the Social Work Department, set about identifying key older people within the East End area, with a view to encouraging the establishment of a pensioners' action group, similar to the elderly forum that had been set up in Castlemilk earlier that year. In November the following year, after much preparatory work, over a hundred people turned up at a public meeting in the area and Pensioners' Action Group East was formed to campaign on behalf of pensioners in the area. At that time two key issues were identified: benefits and post office closures. Other campaigns around that time included protests at the planned closure of the local wash house and campaigns on heating allowances.

PAGE received a big boost with the opening, in March 1989, of an Urban Aid funded Action Centre based in shop-front premises on Springfield Road, one of the main roads running through the area, and next to the local post office. The Centre is run by PAGE members themselves and Val Dick is the full-time support worker, now employed directly by PAGE itself. PAGE has a committee of 17, of whom five make up the Management Committee who manage the Centre, staff and funding. Welfare rights advice is given by members of the management committee on a voluntary basis, and by Val Dick. Besides providing a focal point for PAGE's campaigning activities, the Action Centre also acts as an advice centre, running surgeries on welfare rights, housing and legal issues, for example, and helps PAGE develop links with pensioners' groups throughout the area.

OUTCOMES

PAGE and the Action Centre in particular, are important foci for education and information. Educational inputs have helped members to develop as a committee, enabling them to learn about how to set up a committee, the role of committee members, the organisation of campaigns, and funding and publicity. They have also learnt in practical ways about welfare rights. To help them in their new roles as employers, training has been organised in management skills, interviewing, techniques, and on the committee's new responsibilities as employers. They are increasingly involved in identifying training needs and organising and running training themselves for people from other organisations in the community. Often they get themselves trained and then pass on what they have learned both formally and informally. In October 1991, for example, welfare rights officers were asked to train PAGE advice shop members on changes in Disability Allowances. They then called together representatives from community councils, tenants groups and from the community to

brief them, calling on welfare rights officers for detailed information.

At the same time, members of the group have developed greatly in confidence. They have learned how to believe in themselves, and have learnt to deal on equal terms with "authority", whether in the form of Social Security officials, council officials or councillors. For example, Mrs. Sadie Hart, who is Secretary to the group, got involved in PAGE because she was helping to run a social club in the early 1980s. But she admits that, at first, she was shy and had to force herself to talk. She has since been awarded the Lord Provost's Award for Community Work in 1989, and has recently been asked to be Vice Chair of Strathclyde Elderly Forum, which brings together over 30 Elderly Forums like PAGE, "I would never have dreamt of tackling council officials". She helped organise the "Rarin' to Go" Festival in Glasgow in 1990, went with PAGE to Dublin for the similar festival held there in 1991, and participated in workshops on benefits with their Irish hosts. As a result, action groups have been set up in Dublin, using PAGE as a model. Three from PAGE also went to Copenhagen for a Healthy Cities meeting in 1992.

Though some people think she gets paid, Sadie in fact works voluntarily, even though PAGE takes up, she says, 40 hours a week! She is doing something she loves doing, helping people, and it helps her forget about her asthma. "You are providing a service, but you are so happy at the end of that, that they're happy, and that's the caring bit, that's something you've got to think about". She also feels that what she is doing is of longer term benefit and much needed. "The kids of today will get the benefits of what we have done".

Certainly PAGE Action Centre has had an important impact in the Community. It is in contact with over 30 clubs, bringing issues to them, investigating problems in the community. One important aspect is indeed individual enablement, empowering people, convincing them that it is not charity, it is their right. One aspect of this is giving people back their dignity, enabling them to achieve what is theirs by right. This has other obvious spin offs as well in terms of personal enrichment and the quality of people's lives. For example, there are health benefits as a result of being able to eat better and to keep warmer. Another benefit is reduced isolation, and the ability to participate more in community life by no longer being a prisoner at home. One woman is reported by the committee to have said that she could get out of the house more because the extra money had enabled her to buy a warm winter coat.

The Centre also helps to encourage people to feel differently about themselves. The woman who is looking after her handicapped daughter alone will not be made to feel that it is her fault if she cannot cope on her own. Campaigns have also had an important impact. As a result of one, on dampness, people started coming in to the Action Centre complaining of £120 two month bills for electricity. The Technical Services Department did a survey, which highlighted the need for new windows and heating systems to the Housing Department.

PAGE also adds an educational dimension to the social routine of pensioners clubs. It offers informative talks, keeping members up to date. The clubs themselves are changing as a result and are becoming more questioning and PAGE committee members feel that "The angrier they get the more active they get". Whereas, in the past, PAGE used to ask to go to Clubs, it tends now to be the clubs that make the first approach. But such change does not happen overnight.

Beside providing formal training, PAGE offers more informal opportunities for learning. This is recognised in the wider community. For example, PAGE doesn't need to try to recruit volunteers to join the committee. Serving on the committee is now recognised as an important learning opportunity in itself. Members of the committee are also important role models, who are well known in the local communities.

RESPONSIVENESS, ACCESSIBILITY AND PARTICIPATION

One important feature of the centre is that people who come feel comfortable there, and do not feel that they will be sent away for asking silly questions, and will not feel silly asking them. It is physically accessible, on the ground floor and on a main road. Word of mouth recommendation remains an important factor in involvement. The Centre is aimed at everyone aged over 60 in the area, though no one is turned away. The oldest age groups and housebound are under represented, especially those who do not have access to home helps.

Attempts are made to target carers, and to offer them respite care. A newsletter has been tried to reach those who cannot come to the centre, but was abandoned because it took up too much time. On the other hand, the many outreach activities of the centre help create a climate whereby others are empowered to act themselves.

The committee keep records of enquiries (some 2000 in the last year), and are responsive to changing patterns of enquiry. These often highlight, in turn, training needs, and the group have carried out training needs analyses which have highlighted the need for training in, for example, committee skills, community care issues and the poll tax. Their activities promote public discussion, within the older people's groups with whom they are in contact, and they have had an influence on local issues.

COSTS

The project is an excellent example of the "social economy of the third age" in action. The work of PAGE is undertaken almost entirely by volunteers, who have themselves been enabled to undertake the roles they do through their involvement in the project.

PAGE costs some £36,000 to run last year, a sum which pays for the project leader, her assistant, and a part time cleaner. But the added value provided by the centre goes far beyond the monetary value of the benefits claimed (to which those who claim are entitled anyway) or the numbers of enquiries that pass through the door. One valuable way to look at this is to ask what the probable costs would be if PAGE did not exist. Many of these costs can be translated directly into the costs to social and other services of looking after those who have failed, at an earlier stage, to claim benefits to which they were entitled. Others relate to the "opportunity costs" associated with failing to enable the many and varied outcomes to take place. To take just two examples: if PAGE had not existed, it is unlikely people from the area would have been involved in "Rarin' to Go!", and the opportunities for foreign travel would not have been presented. Nor would they have presented a role model to others, including the action groups set up in Dublin and modelled on PAGE.

4. SOME REFLECTIONS OF THE FRAMEWORK IN ACTION

The framework presented here offers a tool for funders, policy makers, providers and participants alike to get a greater feel for the value of what they are doing. It can be applied in both internal and external evaluation and can be used, not only to justify to others what is being done, but also to monitor effectiveness internally. Indeed one of the heartening themes to recur in carrying out the case studies was the way in which participants commented that they had not realised how much had actually been achieved. More thorough application of the model over time should provide permanent evidence to all parties of where provision is being effective, and to highlight areas for improvement.

While the study has shown that the model can be applied to a wide variety of contexts, and to contexts where the actual learning can be quite informal, only some of the model's potential has been demonstrated. It has not been possible to go into detail. The approach adopted in this study has, for example, not involved the whole variety of media suggested by the model, but has concentrated on what was possible.

In particular, evidence of the processes involved in attaining the outcomes reported has, in most cases, not involved direct observation of the provision in action. That said, there was considerable evidence of satisfaction with the processes involved in the community based approaches. As already noted, there was considerable unprompted evidence from participants - particularly in the New Horizons courses - that provision for older adults in Scotland was more responsive, compared with that in parts of England, and that such provision offered outcomes with far more potential to benefit the community as a whole.

Nor has it been possible to make a detailed evaluation of the impact of provision on the wider community. This would highlight and explore the implications of something that is only hinted at in this study - the "seamless web" of interlinking outcomes at both individual and community level, the way in which once an intervention starts, "one thing leads to another". All the results of the interplay between the current educational experience offered as part of a piece of provision, and the whole of the adult's previous learning, cannot themselves be specified in advance.

So there is a need for a more detailed study which applies the framework to one initiative in depth, adopting a longitudinal approach and looking at all the types of evidence suggested, to explore the issues further. In the meantime, one useful step forward would be to encourage providers to adopt the model, and in particular to keep more systematic records of outcomes over time, the processes involved in reaching them, and of costs relating to particular pieces of provision.

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